

## SUMMARY OF FINDINGS

Research regarding the spread of growth in SJC and the quality of life has produced the results summarized below.

- . San Joaquin County is emerging as a major regional subcenter at the fringe of the Sacramento, Bay Area and San Joaquin trading areas, and has close inter-industry linkages to all three areas.
- . The best predictor of employment growth in the county is the U.S. business cycle; since the 1981-82 U.S. recession, local employment has been growing rapidly again.
- . Projections of population growth based on average growth rates over the last 5 years result in 27,300 more unemployed workers in the country.
- . Over the 1975-85 period, the combined loss of 2,700 jobs in agricultural production and services, as well as canning, freezing and processing of food has reduced agriculture's share of total employment from 31% to 22%.
- . The shift away from agriculture has been associated with a dramatic diversification of the county's economic base. The "specialization index," one measure of the differences between

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the local and national industry structure, dropped from .1106 in 1970 to .0569 in 1980.

- . The recent diversification has been characterized by the addition of many small plants in secondary, cluster-serving industries. Of the county's 426 manufacturing plants, only 5 are large cluster-forming facilities, including 2 in wood products, and 1 each in chemicals, textiles, and printing and publishing.
- . Two-thirds of all new jobs in the last 5 years have been in the white collar categories. One-half of all new technical, craftsperson and operator jobs have come from expanding electrical equipment businesses over the past 10 years, while two-thirds of all new professional and service jobs have come from the expanding services sector over the same period.
- . Currently zoned residential land will accommodate projected population growth for 7-9 years.
- . Projected housing needs in Stockton, Escalon and the unincorporated areas are substantially above the recent average annual rate of construction; needs for Lodi, Manteca, Tracy and Ripon exceed the rate of construction in all years except 1984.





- . Currently available commercial/industrial sites will accommodate job expansion to meet the needs of the growing population/workforce for 7-9 years.
- . The relative decline of downtown Stockton as a major shopping area is neither atypical nor irreversible; the 2 major shopping areas in north Stockton have a combined retail sales volume twice that of downtown.
- . Only 7% of the county's workforce commutes to work outside the county. On the other hand, 8% of the county's jobs are held by non-county residents, making the county a net importer of workers.
- . If all of the 8,400 new workforce projected for Tracy and Manteca by 1990 commute out of the county to work, the county's total out-commuters will climb from 7% to 10%, but the number of commuters from these two towns will jump from 3,525 to 11,922.
- . San Joaquin County's quality of life is better than Bakersfield, El Paso, Modesto and Yuba City among comparable cities; it is worse than Chico, Fresno, Little Rock, Mobile, Sacramento and Vallejo.
- . San Joaquin County is in the middle of the pack in terms of standard of living indicators; it is better than all comparable cities in a majority of indicators except Bakersfield, Little Rock and Spokane.



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The Institutional Audit identified 19 groups in San Joaquin County involved in economic development, not including city/county government and smaller cities 'Chambers of Commerce.

A thorough analysis of these findings and the data on which they are based is contained in the report.

#### APPENDIX A

#### SURVEY RESPONSES

Type of Business	County Study (%)	Sample Distribution	Representative Percentages
Ag. Services	1.5%	1.5%	1.5%
Auto	0.5%	1.5%	0.5%
Construction	3.5%	1.5%	1.5%
Manufacturing	5.5%	1.5%	1.5%
Service & Retail Mkt.	1.5%	1.5%	1.5%
Wholesale/Trade	1.5%	1.5%	1.5%
Government	2.5%	1.5%	1.5%
Education	1.5%	1.5%	1.5%
Health	1.5%	1.5%	1.5%
Other	1.5%	1.5%	1.5%

\*County Auditor's Report 1972 (County of San Joaquin)

\*San Joaquin County Economic Development Study

\*Data was collected by telephone and mail survey, including interviews with officials







## SAN JOAQUIN COUNTY

### Business and Industry Survey Findings

#### Introduction

The 1985 San Joaquin County survey of business and industry conditions was designed and administered in February and March of 1986, to provide current information on the trends, prospects, attitudes and concerns of local employers. The survey was mailed to 1,728 businesses in the County, representing 24% of the 7,147 non-agricultural establishments with payroll listed by the Census Bureau in its 1982 survey. In addition, 150 surveys were mailed to a sample of farmers, representing about 5% of the active farmers in the County. 290, or 17%, of the sampled non-agricultural businesses responded, and 20, or 13%, of the sampled farmers responded; this is a typical response rate for such a survey.

The sample was selected so as to include representation from all sectors in similar proportions to their numbers in the county economy. The categorization by type of business in the survey questionnaire was not entirely consistent with the County Business Patterns categories, so it was not possible to match the respondent sample with these categories. Nevertheless the respondent sample appeared to give a good representation of the different sectors (see Exhibit A below).

#### EXHIBIT A

#### SURVEY RESPONDENTS

Type of Business	County Business Distribution <sup>(1)</sup>	Sample Distribution	Respondent Distribution
Ag. Services	1.9%	1.8%	*
Mining	0.2%	0.1%	*
Construction	8.4%	7.5%	9%
Manufacturing	6.1%	7.9%	12%
Transp. & Public Util.	5.8%	4.5%	*
Wholesale trade	7.1%	8.3%	6%
Retail trade	27.5%	26.7%	25.0%
Finance, Insurance, Real Estate	8.4%	9.0%	7%
Services	32.5%	30.0%	26% <sup>(2)</sup>
Other	<u>2.0%</u>	<u>3.4%</u>	<u>16%<sup>(3)</sup></u>
	100%	100%	100%

\*Included in "Other"

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<sup>1</sup>County Business Patterns 1982 (Bureau of Census)

<sup>2</sup>Business and Consumer services only

<sup>3</sup>Includes agriculture ag-services and medical services, mining, transportation and utilities





Manufacturers were slightly over-represented, but this was fortunate, since manufacturing represents a disproportionately high percentage of county employment (manufacturers have higher average numbers of workers than many other sectors). The respondents were distributed fairly closely across business sectors, although some were included in the catch-all category of "other" given differences in categorization. For example, in our sample, only business and consumer services are explicitly coded; all other services are coded as "other."

The sample of businesses was drawn from a number of different sources. This was necessitated by the lack of any available county-wide listing of businesses. Business license listings have been the usual data base for surveys of this kind. However, in San Joaquin County this proved not to be feasible, due to the differing systems used by the seven license-granting entities (six cities and the County) to record their business licenses. The business license data base was not computerized in all the cities; in addition, not all use the same categories to classify types of businesses. We also tried to obtain a list of businesses from other sources inside the County, such as the utility companies, but were not successful.

Three different sources were eventually used. First, 1679 firms were chosen randomly from a Yellow Pages data base for San Joaquin County. Second, 108 manufacturing firms were chosen from the Industrial Directory compiled by the Greater Stockton Chamber of Commerce; most of this sample was randomly selected, but a higher proportion of firms (with over 100 employees) were selected, in order to be sure that the County's major manufacturing employers were included in the sample. The third source was the County Farm Bureau, which sent out 150 survey questionnaires to a sample of its members.

While the consultant team feels that the business listings used to draw the sample were adequate, we feel that future survey efforts of this kind would be greatly facilitated by the existence of a county-wide data base of employers, or at least a uniform recording system for business license data. Regular surveys of employers can provide crucial data on local economic prospects and trends and changes in the number of jobs, providing a valuable basis for planning, evaluating, and monitoring programs and strategies.

The survey questionnaire was designed as an all-purpose instrument, general enough to be sent to all sectors of the business community. However, several of the farmers who responded pointed out that the questionnaire was inappropriate to the concerns of agriculture. We feel this criticism to be well taken. While some types of questions may be relevant to all sectors, such as those on capital availability, governmental relations, business prospects, supplier-customer linkages, etc., many of the questions do not capture the unique production characteristics, concerns and constraints of farming operations. The consultant team therefore recommends that a separate survey of agricultural establishments be conducted at some time in the near future, in order to assess the condition of the agricultural economy, and the concerns of county farmers.

### Key Highlights

- The great majority of respondents found the county business climate to be favorable or at least acceptable; 85% of respondents found the tax climate acceptable, 78% found the regulatory climate acceptable; 89% found the financial community acceptable, and over 90% evaluated the workforce positively.
- There is a wide spectrum of perceptions about government's attitude to business; the respondents were split evenly into 3 groups, 31% perceiving government to be pro-business; 32% anti-business; and a third in-between.





- A large proportion of businesses are unaware of the existence of government programs to help businesses; 71% had no information about financing assistance; 48% did not know about worker training programs; and 72% did not know about management and technical assistance programs.
- Only 2% of respondents use water as a primary means of transportation, despite the presence in the County of the Port of Stockton.
- Support services were found to be generally satisfactory, although 13% mentioned repair and maintenance services as being difficult to obtain.
- While 74% said their principal customers are in San Joaquin County, only 47% said their principal suppliers were in the County. The Sacramento and Modesto areas are as important in terms of customer and supplier markets as is the Bay Area.
- The results show stability among employers, despite the high county growth rates. Sixty-eight percent of businesses had been at their present location for 5 years or more, and 62% of those who moved recently had relocated from elsewhere in the city.
- Businesses are prospering for the most part and are generally optimistic about their future prospects; 61% of the businesses grew and 45% expanded or improved their facilities recently. Forty-one percent plan to expand their facility in the near future, and 79% expect their business to increase.

### **Profile of Respondents**

The respondents are fairly well distributed throughout the sectors of the economy (see Exhibit B in the appendix). The largest number are in the retail trade sector (25%), followed by consumer services (15%), manufacturing (12%), and business services (11%). The 9% 'other' category includes transportation, public utilities, mining and health services.

Large firms are well represented; 27% of respondents had 100 or more employees. But the bulk of respondents were small businesses, reflecting the actual distribution of county businesses; 75% of all respondents have 20 or less employees, and 60% have less than 10 employees. The majority (65%) are single establishments, while 17% are branch facilities; 4% are subsidiaries; 4% are franchises and 8% are headquarters locations.

### **Location and Investment Decisions**

The majority (68%) of respondents had been at their present location for 5 or more years. Only 1% had moved in the last year. Most businesses had previously been located elsewhere in the neighborhood (36%) or in another part of the city (26%). Those who had moved into the County had generally moved from another region of the state or from elsewhere in the U.S. or another country; only 2% of relocations were from elsewhere in the region.

Forty-five percent of respondents had expanded or improved their facilities in the last 3 years, and 41% had plans to do so in the next three years. However, expansions have been, and will be, considerably more common among large firms (100+ employees) than among small ones (under 20 employees). Eighty percent of the large firms versus 59% of the medium and only 39% of the small had expanded or improved their facilities in the last three years. Manufacturers and wholesalers are considerably more likely to have expanded than other kinds of businesses. (These two results are probably linked since county manufacturers have more employees and are therefore larger on average than non-manufacturers.) These results are shown in Exhibits C and D in the appendix.



Fully 50% of respondents said they had room for expansion at their current location, but again, large firms are more likely to have sufficient space than are small firms (84% and 46% respectively). Manufacturers are much more likely to have sufficient space than are other business types. Sixty-seven percent of respondents think that land and buildings for expansion are available in the County; thus, availability of commercial and industrial land in the County is apparently not a constraint on the majority of county businesses. Only 7% believe that land and buildings are not available. The majority (67%) consider the cost of available land and buildings to be acceptable.

Respondents appeared to be generally satisfied with their current locations; 81% of the 151 businesses who have room to expand at their current site said they would, indeed, consider expanding at that location. Of those who had no room, all would consider remaining in the County if they were to expand; this indicates general satisfaction on the part of respondents with doing business in the County. Nevertheless, large businesses are considerably more satisfied than are small ones; while 100% of large firms with room to expand would do so at this site, only 74% of small firms would do so.

Respondent businesses had an upbeat view of their locations, with many more mentions of site advantages than disadvantages (see Exhibit E). The results of this section are difficult to assess due to the wide geographical range of the survey, covering six very different cities and the large unincorporated area. Conditions presumably vary a great deal. By far the most frequently cited advantages of sites were proximity to customers (56% mentioned this). Operating economies were mentioned by 33%; access to transportation by 31% and availability of parking by 27%. None of the disadvantages were mentioned as frequently. Most frequently cited disadvantages were crime rate (20%); lack of parking (17%); high operating costs (17%) and low quality of neighborhood (15%).

## EXHIBIT E

### LOCATION FACTORS

#### Advantages and Disadvantages of Site (Multiple Answers)

	Advantage (% of businesses)	Disadvantage (% of businesses)
Parking availability	27%	17%
Access to transportation	31%	7%
Availability of space	NA	14%
Distance to customers	56%	9%
Distance to suppliers	14%	4%
Visibility	20%	11%
Quality of neighborhood	20%	15%
Crime rate	NA	20%
Labor availability	12%	3%
Labor productivity	NA	3%
Labor relations	NA	0
Operating costs	33%	17%
Location of competitors	NA	5%
Other	7%	6%





## Workforce Appraisal

We estimate that about 14,300 workers are employed in the businesses which responded to the survey, representing over 9% of workers in the County. This is a substantial proportion, demonstrating that the survey is a good representation of county labor market conditions.

Exhibit F shows the distribution of occupations needed by firm; occupations in short supply, and those where workers are perceived as poorly trained. Clerical workers and laborers are the most frequently required types of workers. There appears to be a plentiful supply of workers of all occupations in the County; semi-skilled trade workers, laborers and clerical workers, in particular, are easily available. The greatest deficiency is apparently in the skilled trades, which 18% of firms said were in short supply. Associated with this, skilled trade workers were considered to be the most poorly trained of all the occupations (21% of respondents thought this to be the case). Other workers were apparently considered to have adequate training, since only a low percentage of respondents complained of poor training.

### EXHIBIT F

#### WORKFORCE PROFILE

Occupation	Skill Required (% of total bus.)	Workers in Short Supply (% of total bus.)	Workers Poorly Trained (% total bus.)
Manager	35%	13%	12%
Professional	32%	14%	7%
Technician	24%	14%	12%
Skilled Trade	34%	18%	21%
Semi-skilled Trade	27%	6%	13%
Laborer	40%	4%	7%
Clerical	50%	4%	14%
Other	7%	1%	0%

In fact, business people seem to be well satisfied with the county work force. When asked to rate productivity, turnover, absenteeism and labor relations, 98% thought productivity was at least average; 90% thought turnover at least average; 92% thought absenteeism at least average; and 99% were content with labor relations.

### EXHIBIT G

#### WORKFORCE EVALUATION

	Good	Average	Poor
Productivity	51%	47%	2%
Turnover	48%	42%	10%
Absenteeism	55%	37%	8%
Labor Relations	65%	34%	1%



Average wage rates are shown in Exhibit H. By far the largest proportion of hourly and entry-level workers are paid under \$7 per hour. Sixteen percent of respondents have a unionized workforce, and only 9% (of the 92 who answered the question) had work stoppages in the last 5 years.

## EXHIBIT H

### WAGE RATES\*

	\$3-\$6.99/hr	\$7-\$10.99/hr	\$11/hr +
Hourly workers	59%	27%	13%
Entry-level positions	66%	30%	4%
Top skilled positions	9%	32%	58%

\*About half of the sample respondents did not answer this question.

### Government Assistance Programs

Information and use of employment and training programs appears to be low; only 45 businesses (or 17% of those responding) said they had used such programs, while 22% said they did not exist and 48% did not know (see Exhibit I). These findings suggest the need for much greater marketing and outreach by appropriate agencies to the business community.

## EXHIBIT I

### BUSINESS AWARENESS OF GOVERNMENT ASSISTANCE PROGRAMS

Type of Program	Program Exists (% businesses)	Program Does Not Exist (% businesses)	Don't Know (% businesses)
Financing assistance	16%	14%	71%
Worker training	31%	22%	48%
Management & technical assistance	15%	13%	72%

### Local Market Linkages

Exhibit J shows the principal suppliers and customers of surveyed firms. Most (74%) firms cater primarily to customers inside the county, while only 47% obtain supplies principally from county suppliers. Principal suppliers are located throughout the state and country, with the Bay Area and Sacramento as the most important supplying regions. On the other hand, Sacramento is not such an important customer market for county businesses as are Modesto and the Bay Area. These linkages imply that many businesses are undersupplied locally and that there may be business start-opportunities here to fill in local supply gaps.





**EXHIBIT J**  
**CUSTOMER/SUPPLIER MARKETS**

(Multiple Responses)

	Principal Customers	Principal Suppliers
San Joaquin	74%	47%
Sacramento	7%	17%
Bay Area	13%	21%
Modesto	14%	9%
N. Calif.	14%	14%
S. Calif.	5%	14%
Entire state	7%	7%
Other U.S.	14%	23%
International	5%	3%

**Support Services Evaluation**

Services were considered to be satisfactory on the whole. When asked to evaluate utility and transportation services, 95% and 92% respectively thought that the quality was average or good. Costs of utility services were thought to be high by 68% of respondents, while 71% considered transportation costs to be average. Of all utility services, electric was cited by the most businesses (79%) as being critical to their operations; water by 47%; gas by 42%, and sewer by 37%.

Transportation is largely by motor carriers or business-owned trucks (see Exhibit K). Only 2% of businesses use water as a primary means of transportation, an interesting finding, given the presence in the County of the Port of Stockton.

**EXHIBIT K**  
**TRANSPORTATION**

Primary Type of Transportation	Inbound	Outbound
Own truck	38%	37%
Motor carrier	52%	41%
Rail	4%	3%
Water	2%	2%
Air	7%	7%

Other business services seem to be, for the most part, readily available. The only exception is repair and maintenance services, which were cited by 13% of respondents as being difficult to obtain. These services present another target of opportunity for business start-ups.



## Financing Availability

Most respondents rated the financial community as good (36%) or fair (53%), with 11% rating it as poor. Many respondents found certain kinds of financing hard to obtain; 43 businesses (30% of the 148 who answered the question) found venture capital difficult to access; 40 (or 23%) had problems obtaining working capital, and 22 (or 14%) had problems getting fixed asset financing. When asked whether they needed any particular type of financing assistance, 20% of respondents said yes. The most frequently mentioned type of assistance needed was working capital (9 businesses); real estate financing (5 businesses) and funds to finance expansions (5 businesses).

## Business Climate

The majority of respondents rated the business climate as acceptable, as shown in Exhibit L, although the tax and regulatory climates were thought to be poor by 15% and 21% of respondents respectively. Opinions varied by type of business, with 27% of retailers considering the regulatory climate to be favorable, but only 6% of manufacturers, 5% of finance/insurance/real estate and 4% of construction firms agreeing with this.

### EXHIBIT L

#### BUSINESS CLIMATE

	Favorable	Acceptable	Poor
Tax climate	15%	70%	15%
Regulatory climate	14%	64%	21%
Financial community	36%	53%	11%

## Government Relations

Opinions about local government's attitude to business was sharply split, between the 31% which consider government to be pro-business and the 32% which rated it as anti-business (with 36% in-between). Variables such as geographic location, type of business and size of business were found not to account for these differences in attitude; clearly there is no consensus in the County about the role government plays. It is interesting to note that 50% of responding farmers felt local government to be pro-business (a higher percentage than other business types). It is interesting to note that 50% of responding farmers felt local government to be pro-business (a higher percentage than other business types). It is unusual for perceptions of the local government to be split so evenly and would be interesting to follow up and try to discern the reasons for these varying perceptions.

When businesses were asked what government could do to encourage capital investment in the County, the following suggestions emerged most frequently:

- local government should "clean up its image" (16% of 137 respondents)
- provide more incentives for start-ups and expansions (12%)
- improve quality of life, and promote area's advantages (12%)
- reduce red tape (11%)





- do more long-term planning (10%)
- lower business taxes and fees (10%)

### **Business Prospects**

Most of the businesses surveyed appeared to be prospering (see Exhibit M). 61% of respondents saw their business grow in the last 3 years, and only 16% saw a decrease. Respondents were even more optimistic about their future prospects, with 79% expecting to grow in the next 3 years and only 4% expecting a decline. There was no significant difference here by size of firm. As we might expect, only 31% of farmers said their business had grown, and they were more pessimistic about the future than other sectors. Wholesalers and businesses in finance, insurance and real estate, were the most likely to have increased their business in the last three years (75% and 76% respectively), and 95% of responding finance/insurance/real estate firms expect to grow in the next three years. Lower than average levels of growth were experienced by retailers and construction firms.

Much of this expected growth can apparently be accommodated within existing facilities of businesses, since only 41% expect to expand or improve their facilities. Respondents overwhelmingly attributed business success to general economic conditions (72%).

### **EXHIBIT M**

#### **BUSINESS PROSPECTS**

	<b>Past 3 Years Experience (% of businesses)</b>	<b>Next 3 Years Prospects (% of businesses)</b>
Business increase	61%	79%
Business same	23%	17%
Business decrease	16%	4%
Expansions/improvements	45%	41%



## **APPENDIX OF TABLES**

### **Business Survey**





## EXHIBIT B

### RESPONDENT PROFILE

(Based on 310 responses from establishments located in San Joaquin County)

Business Type	Number	Percent*
Retail trade	76	25%
Construction	28	9%
Wholesale trade	17	6%
Manufacturing	38	12%
Finance, insurance, real estate	22	7%
Business services	33	11%
Consumer services	45	15%
Agriculture	20	7%
Other	27	9%
Did not answer	<u>4</u>	<u>--</u>
TOTAL	310	100%

#### Number of Employees

1-4	83	27%
5-9	104	34%
10-19	47	15%
20-49	38	12%
50-99	11	4%
100-249	14	5%
250-499	2	1%
500-999	9	3%
1000+	1	.3%
Did not answer	<u>1</u>	<u>--</u>
TOTAL	310	100%

#### Corporate Affiliation

Single establishment	194	65%
Branch facility	51	17%
Headquarters	25	8%
Subsidiary	13	4%
Franchise	13	4%
Other	4	1%
Did not answer	<u>10</u>	<u>--</u>
TOTAL	310	100%

\*Adjusted frequencies: numbers may not add due to rounding



**Number of Years  
at this Location****Number****Percent\***

Less than 1	4	1%
1-2	24	8%
3-5	68	22%
5-10	63	20%
10-25	81	26%
Over 25	69	22%
Did not answer	<u>1</u>	<u>--</u>
<b>TOTAL</b>	<b>310</b>	<b>100%</b>

**Previous Location  
(if moved recently)**

This neighborhood	22	36%
Elsewhere in city	16	26%
Elsewhere in county	8	13%
Elsewhere in region	1	2%
Elsewhere in state	8	13%
Other	6	10%
N/A	<u>242</u>	<u>--</u>
<b>TOTAL</b>	<b>310</b>	<b>100%</b>

**Approximate Square Footage  
of Floor Space Used**

Less than 1,000	49	17%
1,000-7,999	153	53%
8,000-15,000	28	10%
Greater than 15,000	58	20%
Did not answer	<u>22</u>	<u>--</u>
<b>TOTAL</b>	<b>310</b>	<b>100%</b>

**Ownership of  
Major Facilities**

Own	158	52%
Rent	144	48%
Did not answer	<u>8</u>	<u>--</u>
	<b>310</b>	<b>100%</b>

\*Adjusted frequencies: numbers may not add due to rounding



## EXHIBIT C

### GROWTH BY SIZE OF BUSINESS

	<u>Small</u> (under 20 employees)	<u>Medium</u> (20-99 employees)	<u>Large</u> (100+ employees)
Expanded/Improved in last 3 years	39%	59%	80%
Expects to Expand/ Improve	38%	46%	64%
Sufficient Space to Expand	46%	51%	84%
Would Consider This Location	74%	96%	100%
Business Increased in last 3 years	59%	71%	63%
Expect Business Increases	77%	86%	75%





# EXHIBIT D

## GROWTH BY TYPE OF BUSINESS

	<u>RETAIL</u> <u>OTHER</u>	<u>CON-</u> <u>STRUC-</u> <u>TION</u>	<u>WHOLE-</u> <u>SALE</u>	<u>MANU-</u> <u>FACTU-</u> <u>RING</u>	<u>FIRE</u>	<u>BUSI-</u> <u>NESS</u> <u>SCVS</u>	<u>CON-</u> <u>SUMER</u> <u>SCVS</u>	<u>Δ</u>
BUSINESS INCREASED IN LAST 3 YEARS 9%	54%	52%	75%	57%	76%	72%	63%	31%6
EXPECT TO INCREASE IN NEXT 3 YEARS 8%	79%	74%	88%	80%	95%	84%	76%	41%7
MADE RECENT EXPANSIONS/ IMPROVEMENTS 9%	40%	25%	65%	70%	27%	42%	42%	50%5
EXPECT TO EXPAND/ IMPROVE 0%	34%	57%	56%	54%	19%	42%	38%	32%4
SUFFICIENT SPACE TO EXPAND 0%	42%	54%	50%	78%	38%	42%	35%	80%5



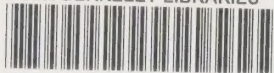
## SAN JOAQUIN COUNTY

### Survey of Agriculture

The results of this supplemental survey are provided on the attached survey from which shows, the raw responses and the percent distribution of responses for each question.

Key findings of the survey can be summarized as follows:

- o 42% of respondents operate on 100 acres or less.
- o 44% employ 5 or fewer workers at peak times, and 82% employ 5 or fewer workers at slack periods.
- o 65% primarily provide fruit and nut crops.
- o 64% have operated at their present location for over 25 years.
- o Suitability of soil and availability of water were the top-rated site advantages; high operating costs was the major disadvantage.
- o 60% own all of their farms and operations.
- o 20% have recently expanded their acreage and 15% plan to do so; 58% say there is room for such expansion.
- o 36% have recently made major capital improvements and 26% plan to do so.
- o 52% deal with a marketing coop; 44% serve customers in the County while 86% use County suppliers.
- o 79% of product is product is processed, 58% of which is processed in County.
- o Over 50% rate their workforce above average.
- o Repair and maintenance services are most difficult to obtain according to 71% of respondents.
- o Respondents generally give favorable ratings to the tax climate, unfavorable ratings to the regulatory climate; 37% feel local government is pro-business.
- o 47% rate the local financial community good.
- o 42% of businesses recently declined; 14% expect further declines.



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